The Build with Intention Toolkit

Table of Contents

Welcome to
Build with Intention.

Build with Intention is a toolkit that enables and empowers teams to consider all possible outcomes and impacts of the products and features they're designing and developing – keeping ethics, inclusion, and accessibility at the forefront.

This toolkit is based upon the work of several incredible civil society organizations, including Consequence Scanning by Doteveryone and the EthicalOS Toolkit by Omidyar Network and Institute for the Future.

Salesforce has adapted these methodologies to fit our needs as a technology company, augmenting the guidance with learnings from conducting our own Consequence Scanning and risk assessment workshops with cross- functional product,

engineering, design, and research teams.

We offer our learnings and adjustments to the public as resources for understanding and mitigating unintended consequences and promoting product inclusion. These resources, templates, and sample exercises are a starting point, and we know there is a lot of work ahead on the path to creating ethical and inclusive products across the industry.

Until then, we're grateful to have the opportunity to share our learnings with you and improve upon them – together.

Sincerely,
The Salesforce Ethical & Inclusive Product Team
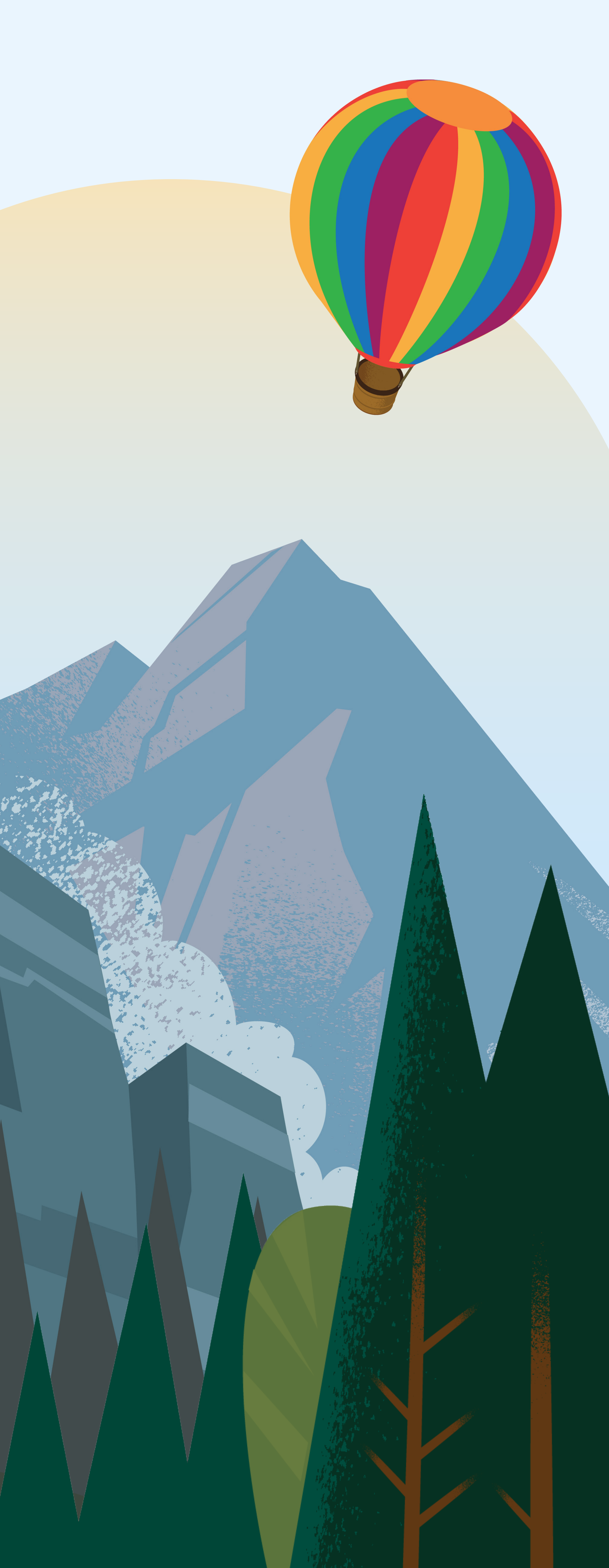
Learning from Partners in the Field

It's important to recognize and learn from organizations who have been doing this work and are Trailblazers in this space.

This toolkit builds upon the Consequence Scanning workshop methodology created by Doteveryone, and leverages ethical considerations published by Omidyar Network and Institute for the Future (IFTF).

Explore the resources to the right to learn about some of the foundational tools and creators helping to define the tech ethics movement.

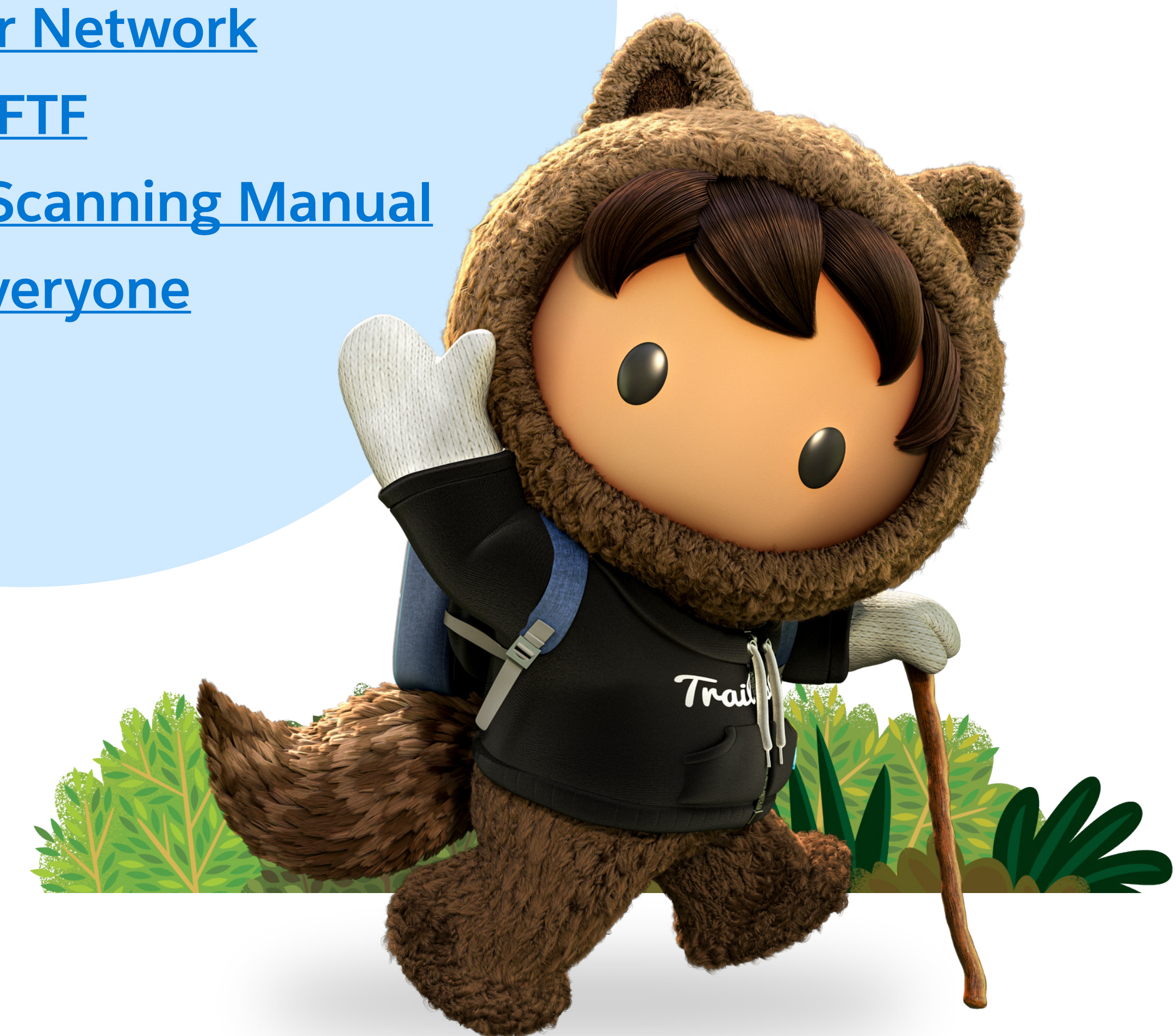**Build with Intention adapts and builds on methods established by:**

EthicalOS Toolkit

Omidyar Network

IFTF

Consequence Scanning Manual

Doteveryone

What Is Build with Intention?

Build with Intention is adapted from Consequence Scanning, and it leverages our experience running workshops with our teams.

Consequence Scanning answers three key questions to help teams share knowledge and expertise so they can map the potential impact of a product or feature:

1. What are the intended and unintended consequences of this product or feature?

2. What are the positive consequences – or benefits – we want to focus on?

3. What are the intended or unintended consequences we want to mitigate?

Build with Intention expands upon this methodology with examples, considerations, and tools that have a lens toward accessibility and inclusion, in addition to ethics.

At Salesforce, this process of considering all impacts across ethics, accessibility, and inclusion drives what we call **Intentional Innovation**. Thinking through these considerations often leads to innovative products that better meet the needs of the people using it.
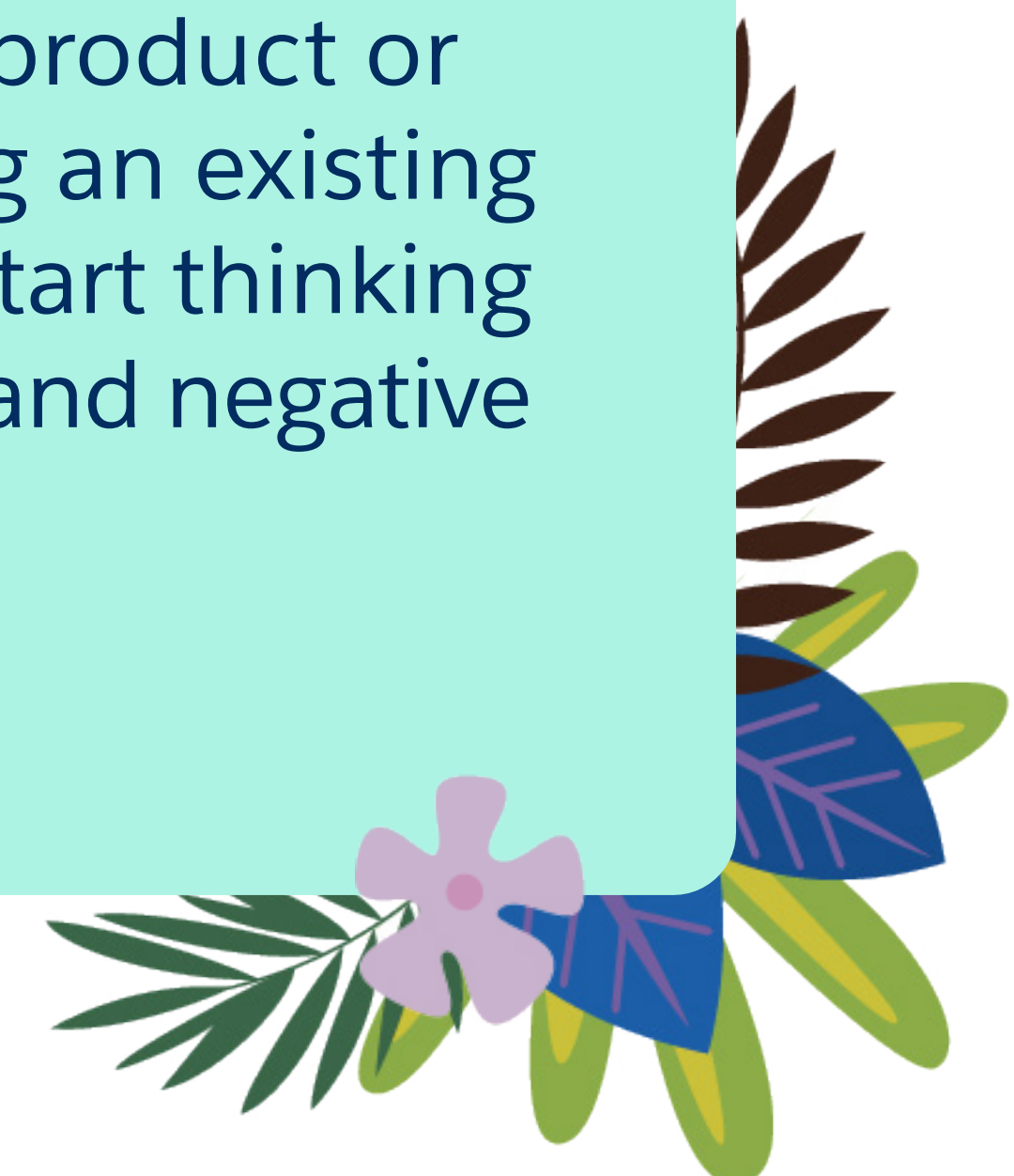
Build with Intention
Workshop Overview

Congrats, you've decided to host a Build with Intention workshop. Now what?

In this section, we'll walk you through a high-level overview of how we host our workshops, and tips we've learned along the way. In the final section, we'll provide you with tools and specific guidance and scenarios to try it yourself.

Who should use this toolkit: Build with Intention is built specifically for scrum teams: core product, engineering, design, user research, and related collaborators, led by a product manager or intentional innovation advocate.

When to use it: The earliest possible stage in a product or feature development life cycle or when planning an existing product's long-term roadmap. While it's best to start thinking about unintended consequences – both positive and negative – earlier on, it's never too late.

Set it up.

I want to host a workshop. What do I need to prepare to set my team up for success?

Get on the same (virtual) page: In addition to the above resources from Doteveryone and Omidyar Network, Salesforce has many resources you can leverage for prepping your teams with a general understanding of ethical use, inclusive design, and accessibility before embarking on a Build with Intention workshop.

We have several educational modules on Trailhead, our free e-learning platform. Get started with our Intentional Innovation Trailmix, which covers topics like:

• Ethics by Design
• Responsible Creation of AI
• Web Accessibility
• Inclusive Design

We also have a wealth of blog posts on the topics of Intentional Innovation that you can find on our website: salesforce.com/ethicalandhumaneuse.

Sharing resources will provide a good jumping off point and ensure everyone is on the same page more generally, before diving into the specific workshop topic.
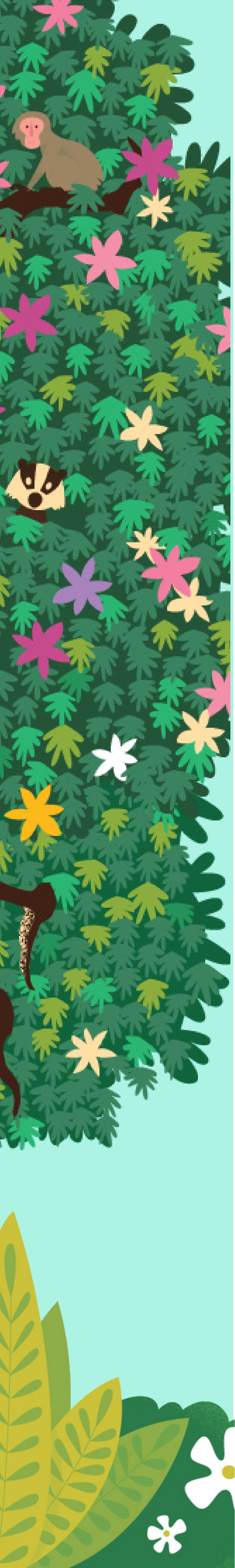
Identify your topic – but use a narrow scope: Define your workshop focus. Choose a specific feature or product to interrogate. In our experience, narrowing in on particular areas of interest or concern allows a deeper dive and more meaningful conclusions.
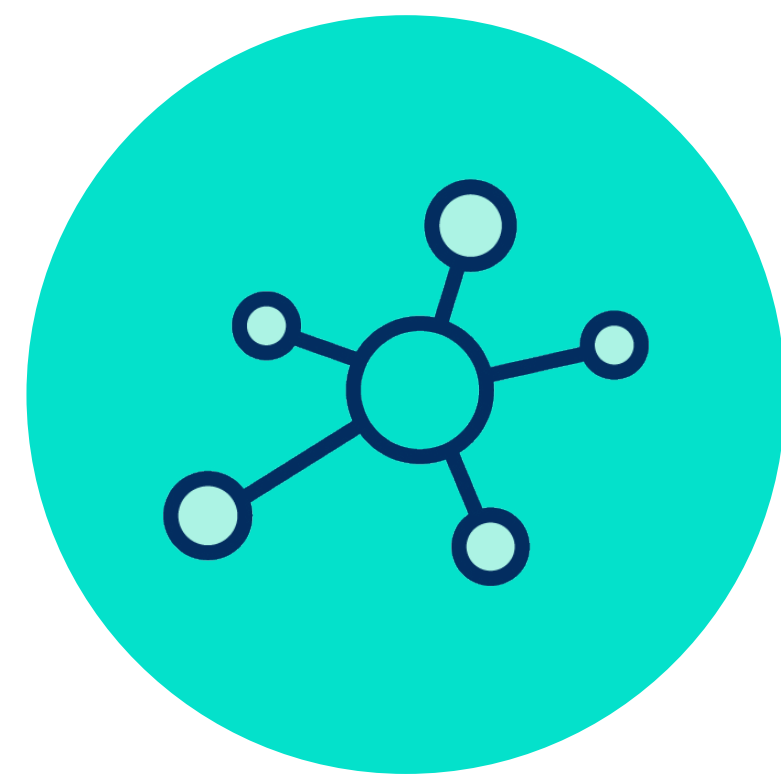
Engage diverse perspectives: We all have biases – obstructions to our perspectives, borne out of our particular experiences – that may limit our ability to spot ethical risk and opportunity.

Bring together a cross-functional group with varied experiences to participate in the workshop. Think about all the populations that might interact with your product or be impacted by them, including any often underrepresented populations.

Assign some homework: Time is always a limiting factor, especially in fast-paced settings. Send out the resources and workshop topic/question to your diverse group of stakeholders ahead of time.

Ask people to come to the workshop with a list of potential intended and unintended impacts of the tool or feature being discussed to keep the workshop as efficient as possible.

Run the workshop.

The day of the workshop has come. What happens during the session?

We typically schedule 60 minutes for the workshop with a 30-minute follow-up meeting.

Begin with a brainstorm. Introduce your new product or feature and the goals of your workshop. Provide some quiet time for participants to consider all the intended and unintended consequences of your new tool or feature, and be sure they write them down on sticky notes or other note-taking supplies.

The facilitator can start by sharing the patterns that emerged from pre-work, while anyone who didn't have a chance to complete the pre-work can add ideas while catching up.

Allow time for additional brainstorming as participants see each others' ideas. Leverage our conversation guide in the next section to prompt additional considerations that may be missing.

Map potential consequences. Draw a 2x2 axis on your collaboration space with one axis representing "Intended vs. Unintended" and the other "Positive vs. Negative." Take the groups' ideas and categorize them into each quadrant: Positive-Intended, Positive-Unintended, Negative-Intended, and Negative-Unintended.

Positive

Unintended

Intended
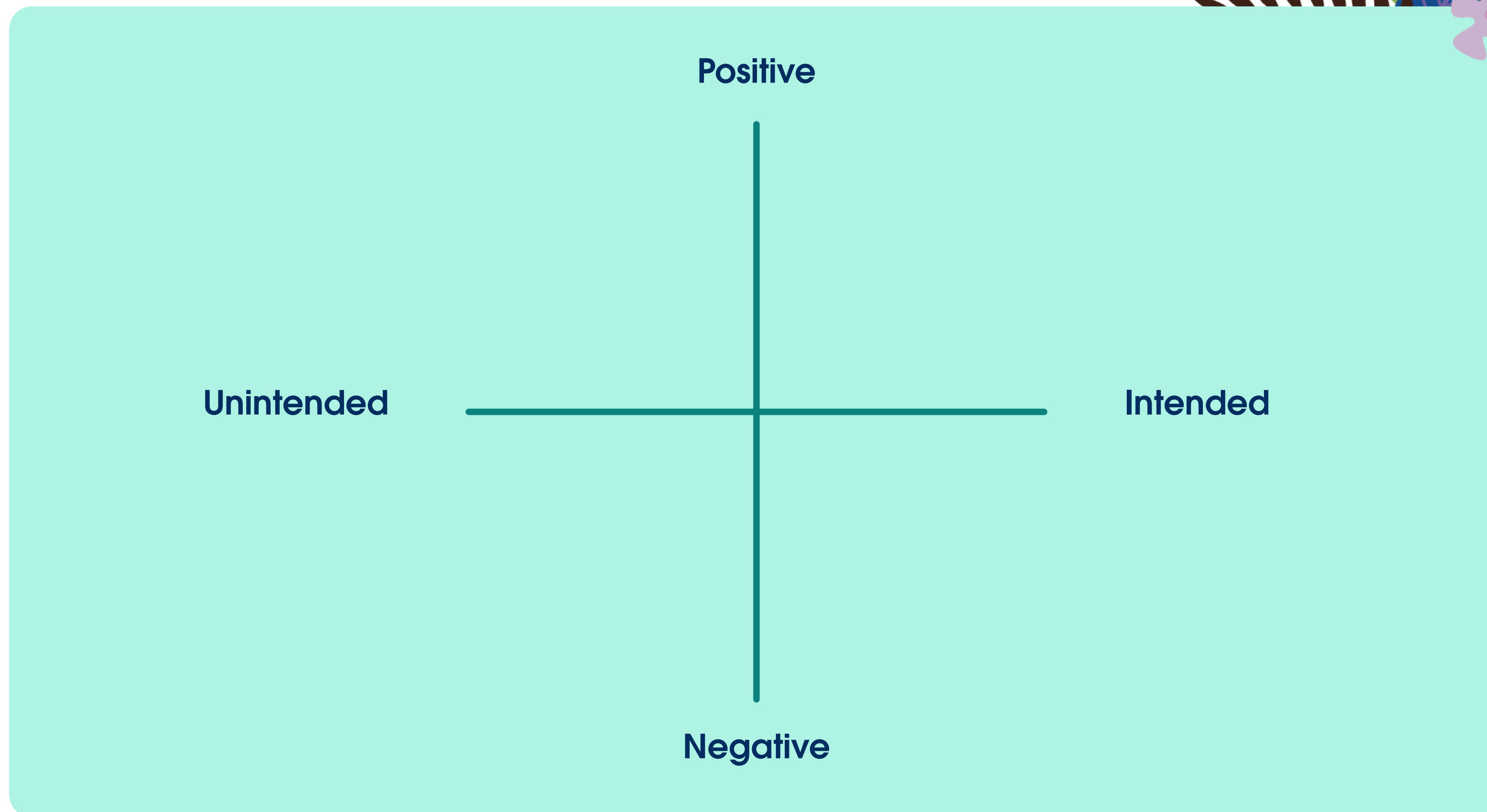
Negative

We like to have participants identify common themes and group their ideas accordingly, to keep the axes more organized.

Discuss! Open up a conversation. What are the positive consequences you want to focus on? What are the negative consequences you want to mitigate? What's doable? What's a must have? What must be done now and what can be saved for the future?

Make it stick.

The workshop is over — now the work to put those ideas into action begins.

Synthesize. Take some time to organize the output from the workshop and identify the top priorities that need to be acted upon.

Make a plan. Meet with team leaders to prioritize actions that address the biggest consequences. Assign individuals to lead the charge for each consequence. Make sure these outputs get integrated into your current roadmap or other existing processes, and leverage existing product development tools so these are embedded, not tacked on as an afterthought. Schedule a 30-minute follow-up meeting after the workshop if necessary.

Get feedback and iterate. This is a continual learning process. Solicit feedback from the teams that participated and adapt the framework, considerations, and specifications to suit your company and team's needs.

"This was a great exercise for me to learn more and think more critically ... For the particular use case that we discussed, it illuminated that the most obvious benefits were for our customers and ourselves, and doing the exercise helped us be more thoughtful about the end user, too. Knowing this framework will help me be more critical of what we are building."

— Workshop participant

Build with Intention in Action: Your Tools for Success

As promised in the previous section, we have templates and tips for you as the workshop facilitator to leverage, iterate, and build upon. These are all suggestions and jumping off points. By putting this into practice over time, you'll be able to adapt the frameworks to your team's needs.

Get Set Up

Determine Your Topic

Using a narrow scope, define your workshop focus and choose a specific feature or aspect of a product to interrogate. In our experience, narrowing in on particular areas of concern allows a deeper dive and more meaningful conclusions.

Too Broad – Example Prompts

❌ We want a digital transformation of our marketing tools.

❌ How can we change our customer service console?

Specific – Example Prompts

✅ How can we use real-time personalization to better serve customers visiting our website?

✅ What are the impacts of building a new app for field service workers that routes them to appointments?

In this toolkit, our templates use the scenario of a smart toilet:

A major data aggregator offers free health insurance to anyone who agrees to install a smart toilet in their home and submit its data to the company. Smart toilets can detect stress hormones, pregnancy, infectious diseases, alcohol and drug use, and blood sugar levels, among many other things.

According to the contract that participants must sign, data collected from these smart toilets can be used for any purpose without limitation, including being sold to third parties, used for targeted marketing, or shared with the government and scientific researchers.

Should we build this? What are the positive, negative, intended, and unintended uses of this product?

Choose Your Workshop Participants

To have a successful working session, it's imperative you have the right folks in the room – and not just the folks who are always included. Take time to think about whom to intentionally include in the discussion.

Which populations are we working to include and serve?

We strive to focus on and include the following populations which are traditionally marginalized and underrepresented in product design and development processes.

• **People with disabilities.** This may mean permanent disabilities, or, the situational or momentary disabilities that everyone faces at some point in their lives.

• **Underrepresented groups.** This includes – but is not limited to – people of underrepresented race, ethnicity, gender, age, sexual orientation, and veteran status.

• **Diversity of culture and thought.** Religion, cultural customs and norms, background, expertise.

• **Groups facing barriers to access not covered above.** People living in different regions and geographies around the world, non-native language speakers, non-literate users, rural vs. urban areas, socioeconomic status, varying levels of tech literacy, housing status, or documentation status.

By including these groups who face greater barriers to access in the process and in our considerations, we're able to create products and features that are more innovative, unlock access to broader populations, and benefit everyone.

It's important to note that these populations change depending on the issue or product focus at hand. Sometimes products and features may pose higher risks to certain populations that may not appear on the above list.

That's why we build with intention and purposefully take time to consider all the outcomes and populations that potential risks may impact. Questions you might ask yourself include:

• What job functions are needed from the product team and cross-functionally?

• Is there diverse representation across role, level, tenure, demographic characteristics, geographic location, and so on?

• What voices are missing?

• How can we bring perspectives of our customers, end users, and communities into the fold?

Pre-Work Assignment

Now that you have the right group, it's time to schedule the working session and assign some pre-work.

Tool #1 — [Email Template with Pre-Work and Instructions](#)

The homework assignment introduces the idea of Build with Intention and details the sample exercise scenario.

It asks the participants to brainstorm answers to the question "What are the intended and unintended consequences of this product or feature?" on their own, ahead of the group workshop time.

They are then asked to write their ideas onto sticky notes to bring to the workshop or enter them in a shared digital collaboration document, like our Idea Collection Template below.
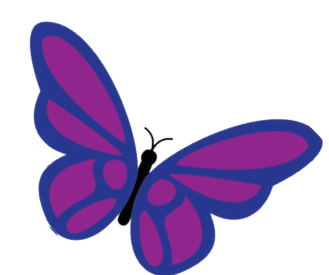
Tool #2 — [Pre-Work Idea Collection Template](#)

And, to help spark creative ethical and inclusive thought, Salesforce has created a Considerations Guide to prompt teams to think about certain risks we've found to be of high importance and shouldn't be overlooked.

Tool #3 — [Considerations Guide](#)

Running a Consequence Scanning Workshop

(60–75 minutes)

Prepare Resources

In-Person Workshop

• Whiteboard or blank wall and large sheet of paper
• Sticky notes or other note-taking tools
• Markers or pens
• Dot stickers (optional)

Virtual Workshop

• Reliable internet connection
• Virtual meeting room
• Google Jamboard or alternate virtual collaboration space (templates included in the following section)

We also recommend having handy:

• A copy of your company's vision, mission, and values, and any related visions or values specific to your team's goals.

• Copies of helpful resources, like our Build with Intention Considerations Guide or EthicalOS risk zones, that can help you think through trade-offs that may be specific to your industry, sector, or type of product.

Let the Workshop Begin: Ideation

So, you've sent out the pre-work and gathered the right group of folks to provide diverse perspectives and that represent all teams responsible for the success of the product or feature. Now for the fun part.

Take the brainstormed sticky notes – the intended and unintended consequences ideas – and apply them to the 2x2, with one axis representing positive and negative, and the other representing intended and unintended.

This can take the form of a physical axis drawn on the whiteboard or piece of paper, or virtually on a shared collaboration board. If you are hosting the workshop online, you can use our template, which includes the axis and other helpful tools to work through the stages of the workshop.

Tool #4   **Access Our Public Build with Intention Template**

While putting up sticky notes or virtual notes, have your workshop attendees group similar ideas together.

Then allow for some quiet time for participants to take it all in and give them the opportunity to add new consequences based on the other posts.

Ask questions and hold a discussion about what the team is seeing on the board and solicit ideas of theme groupings to make the takeaways clearer to see.

This may conclude the first working session (recommended time: 60 minutes). We recommend scheduling a follow-up 30-minute session to take what you've learned from the ideation phase and turn it into concrete actions and next steps for the team.

Moving from Ideas Toward Action

The next step of Build with Intention is making it stick. This step is to determine which of the ideas coming out of the workshop are within your ability to act upon. Note that this phase may need to be held in a shorter, follow-up session or asynchronously.

The Consequence Scanning methodology sorts them into these three categories, which we also use: Act, Influence, and Monitor.

Act: consequences within the control of the participants to act upon

Influence: consequences out of your control but which you can influence the outcome of

Monitor: consequences completely beyond your control but which could affect your product, and so you should understand better and monitor

During this phase, put the sticky notes or virtual notes into one of the three categories. Then, have the group vote using stickers or online markers to denote whether the consequences in the Act and Influence categories are positive, negative, or both.

Focusing on the Act and Influence sections, hold a discussion to determine how to make the consequences in these areas more positive than negative. This will produce action items for the team and responsibilities or tasks should be assigned to owners, as appropriate.

We recommend using the Consequence Scanning log template to keep track of all ideas, priorities, and next steps so they are visible to everyone on the team.

Tool #5 — [Consequence Scanning Log Template](#)

Workshop Documentation and Follow-Ups

After you've identified the risks, prioritized them, and assigned owners to mitigate the risks, it's good practice to create a workshop summary and highlight next steps for the team and stakeholders.

Tool #6 — [Action Plan Template](#)
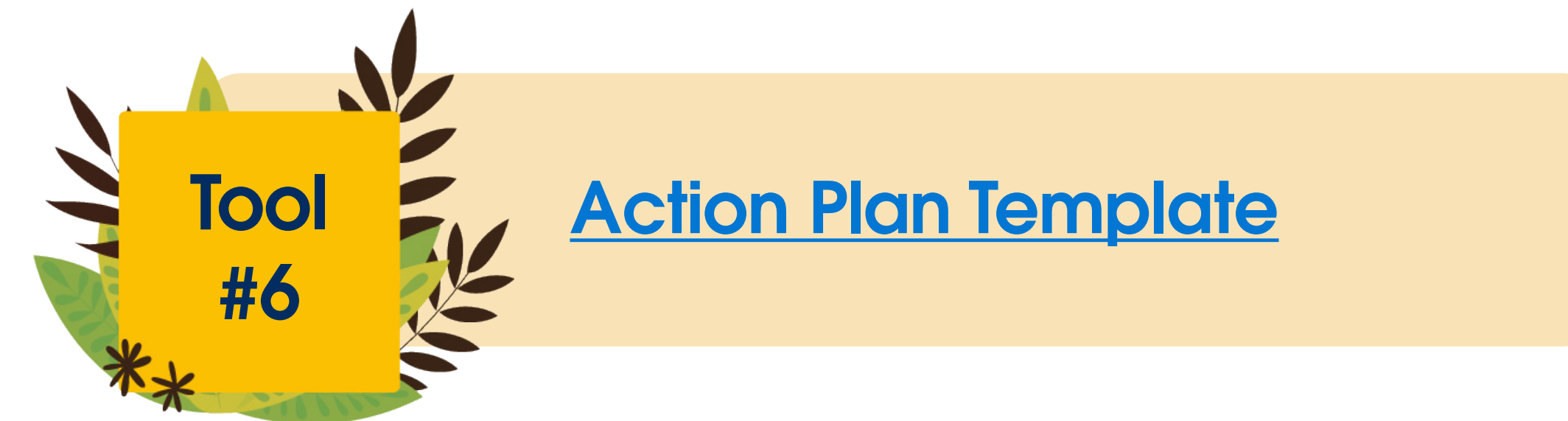
We also recommend collecting feedback about the workshop to understand what worked well for your team, and what can be improved.

Tool #7 — [Feedback Survey Template](#)
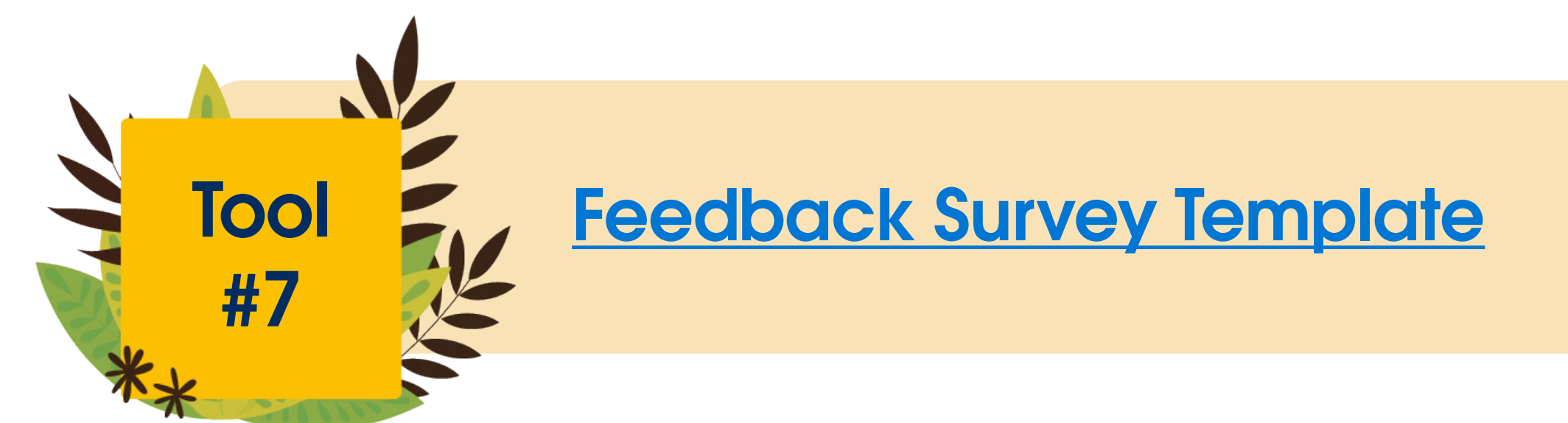
We Are
Learning Together

The Build with Intention workshop is just one way Salesforce is working to bring ethics and inclusion into our product development life cycle to prevent harm and promote human flourishing.

We know we don't have all the answers, and we can't do this work alone. We're always looking to learn, improve, and grow. Please contact BuildwithIntention@salesforce.com to provide feedback – positive or negative – about this toolkit.

Moving forward, we will continue to take responsibility, share our learnings, and hold ourselves accountable for the technology we put out into the world. We're thrilled you are here with us and hope you've found these resources helpful as you and your teams move further down the road on your ethics, inclusion, and accessibility journeys.

We believe that technology can change the world and unlock human potential. And we have the power to change technology.

To learn more about our approach, principles, processes, and initiatives, visit our website.

Acknowledgments